

Maintain GA Information

Scope

This section describes how to use SFA FMS to maintain GA information.

System References

N/A

Policy

N/A

Responsibility

SFA Financial Partner Manager.

Distribution

N/A

Ownership

N/A

Activity Preface

This activity is performed whenever someone with an SFA FMS responsibility needs to switch responsibilities in Oracle.

This procedure continues from:

Run Reports [PROG0016]

Maintain GA Information-SFA Financial Partner Manager

Switch Responsibility

Who: All SFA FMS responsibilities

Frequency: As Needed

Situation: A user may need to switch the responsibility that they selected at sign-on in order to access the windows, menus, actions, and data sets that they need to accomplish their work tasks.

1. From the Navigator window, select **Switch Responsibility** from the **Special** menu -OR-.
2. Click the **Responsibility** icon on the Toolbar. The “Responsibilities” window appears.



3. Highlight the responsibility you would like to use and click **OK**, -OR-
4. Double-click the responsibility you would like to use. The “Navigator – SFA Financial Partner Manager” window appears.

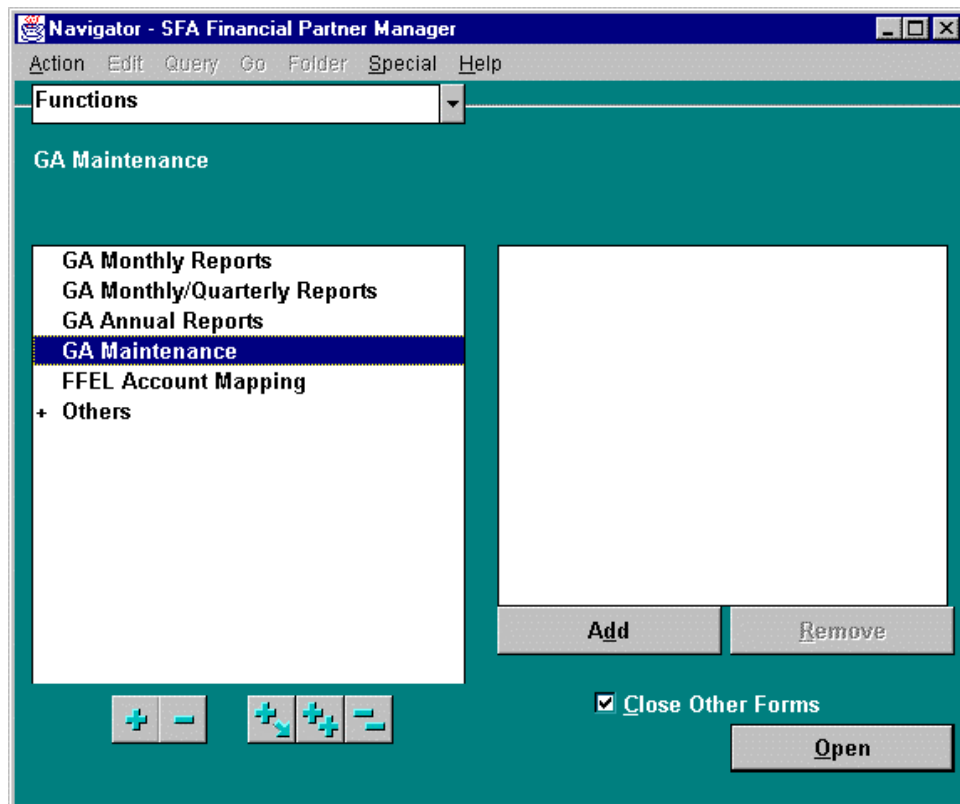
GA Maintenance

Who: SFA Financial Partner Manager responsibility

Frequency: As Needed

Situation: A FP Manager will need to maintain agreement dates and submission schedule for GA.

Access GA Maintenance information



5. From the “Navigator – SFA Financial Partner Manager” window, click GA Maintenance.
6. Click the **Open** button. The “SFA GA Maintenance” window appears.

SFA GA MAINTENANCE

Action Edit Query Go Folder Special Help

GA Code

GA Name

Expected Quarterly Report Submission

☒ Quarterly ☐ Monthly

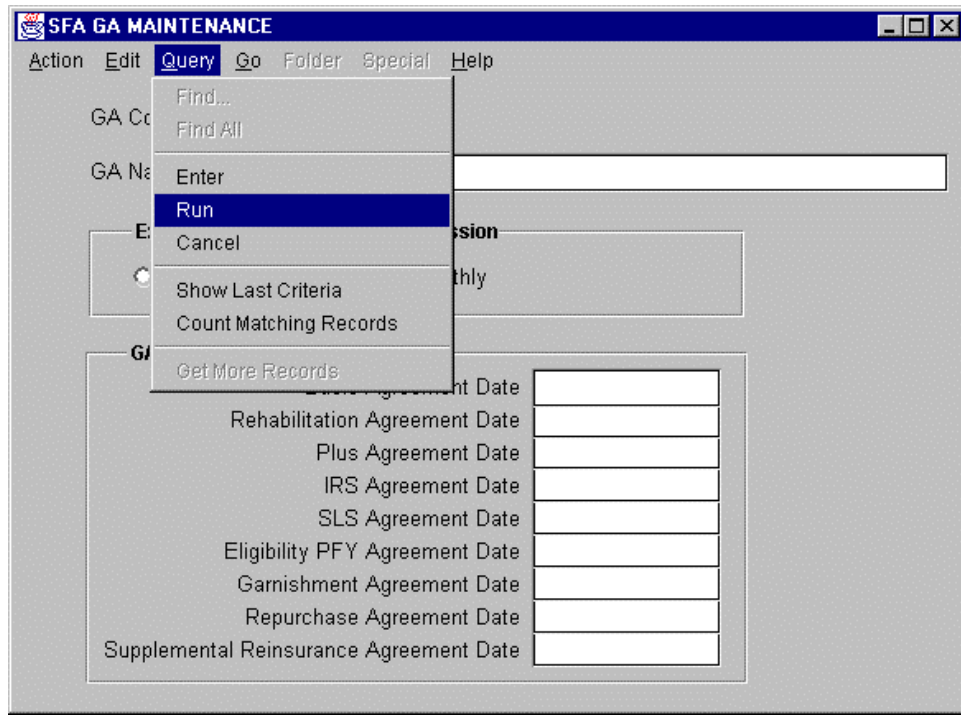
GA Date Maintenance

Basic Agreement Date	<input type="text"/>
Rehabilitation Agreement Date	<input type="text"/>
Plus Agreement Date	<input type="text"/>
IRS Agreement Date	<input type="text"/>
SLS Agreement Date	<input type="text"/>
Eligibility PFY Agreement Date	<input type="text"/>
Garnishment Agreement Date	<input type="text"/>
Repurchase Agreement Date	<input type="text"/>
Reinsurance Agreement Date	<input type="text"/>
Supplemental Reinsurance Agreement Date	<input type="text"/>

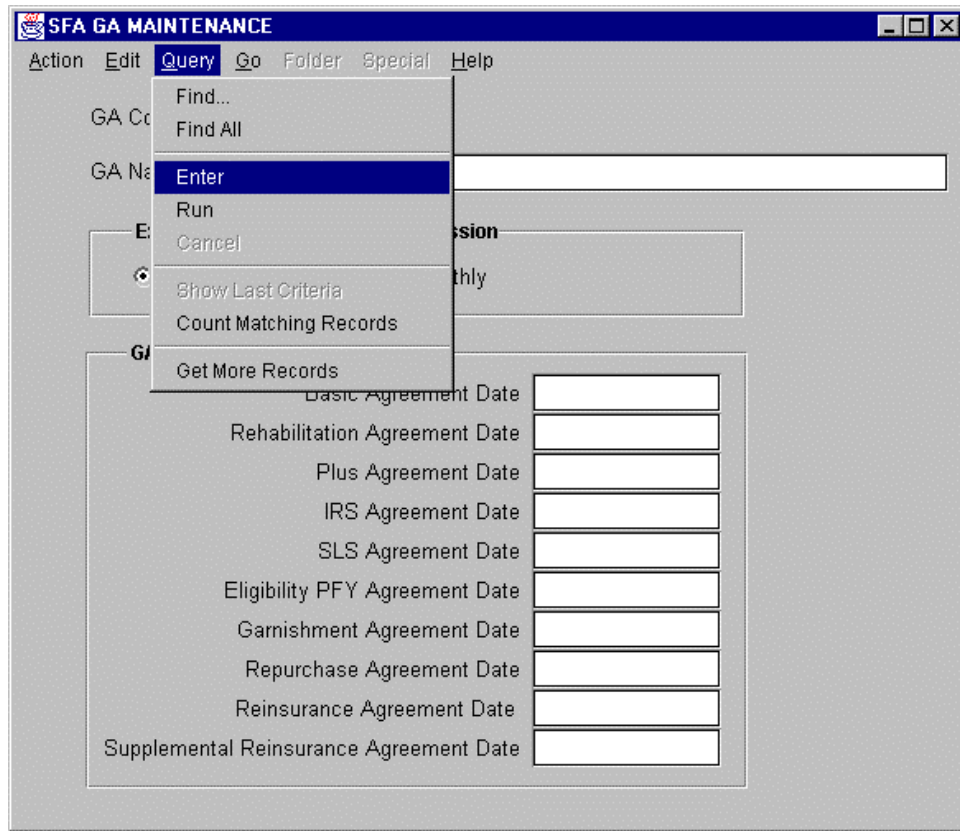
FYI: There are two methods for searching to find existing records:

Select **Run** from the **Query** menu to display all records. The records display in ascending order by GA Code.

Select **Enter** from the **Query** menu to enter specific search criteria. Then, select **Run** from the **Query** menu to execute your search. The records that match your search criteria will display in ascending order by GA Code.



7. Select **Run** from the **Query** menu to see the records for all GA Codes. The records appear in ascending order by GA Code.
8. Use the **Arrow** key on the keyboard to page down through the records to find the specific GA that you need to maintain.



9. Select **Enter** from the **Query** menu to query for the specific GA record. The fields in the “SFA GA Maintenance” window are cleared.

SFA Financial Partner Managers may search on the following fields: **GA Code**, **GA Name**, or any of the **Agreement Date** lines.

To search in any of the **Agreement Date** lines, use the data format DD-ABC-YYYY where DD is the two digit day, ABC is a three letter abbreviation for the month, and YYYY is the four digit year.

10. Tab to the field in which you would like to search for and type the information that you would like to find.
11. Select **Run** from the **Query** menu. The “SFA GA Maintenance” window shows the records that match your search.

GA Date Maintenance	
Basic Agreement Date	25-OCT-1985
Rehabilitation Agreement Date	24-JUN-1993
Plus Agreement Date	25-OCT-1985
IRS Agreement Date	
SLS Agreement Date	
Eligibility PFY Agreement Date	
Garnishment Agreement Date	22-APR-1993
Repurchase Agreement Date	12-MAR-1990
Reinsurance Agreement Date	
Supplemental Reinsurance Agreement Date	25-OCT-1985

12. Tab to the field and type changes as needed.

FYI: The Expected Quarterly Report Submission check boxes are used to tell the system whether this GA will submit monthly/quarterly report information on a monthly or quarterly basis. In order for the system to function properly, it is imperative that this data be updated when a GA informs SFA that it wants to change the frequency of its submission. The GA cannot change the frequency of its submissions mid-quarter; therefore, this information should not be changed until the beginning of the quarter that they would like the change to take place. The GA Date Maintenance fields are used to track the dates that these agreements were signed. This information should be updated whenever these dates change.

13. Click the Save icon on the Toolbar to save the report.

14. Click the **X** button to close the “SFA GA Maintenance” window. The “Navigator – SFA Financial Partner Manager” window appears.

End of activity.

